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Aras Community Solution Add-on:

30-Aug-2013

Document Hierarchies

V2-1

User Guide

All Employees

- Can access Document Hierarchies from TOC only. (Default Category is set to „Handbooks“)
- In this view only released „Document Sections“ (hierarchy nodes) and released „Documents“ are displayed. And only „Documents“ the user has access to, in general.

When Opened from TOC - View

Re-loads entire hierarchy, again

Number and Rev of related „Book‘
of this Hierarchy
(defined by TOCDBK_XXX variables)

Technical specs

Manufacturer	MakerBot Industries
Model	Thing-O-Matic
Technology	Thermoplastic extrusion
Price	\$1099 for the Thing-O-Matic Kit which includes our new Stepstruder MK7
Annual Service	This is a hot rod style device on the cutting edge of 3D printing technology and like a hotrod, you'll have to oil it and do occasional maintenance. There is no service warranty.
Machine Size	It's 12"x12"x16" LxWxH
Weight	Approx. 12 lbs or 5 kg.
Materials	ABS or PLA Plastics. The Plastruder MK5 and below use 3mm filament. The Stepstruder MK6 can take both 3mm and 1.75mm filament and the new Stepstruder MK7 uses 1.75mm filament exclusively.
Material Cost	See the store for current pricing. But it's not expensive.

The screenshot shows the Aras Innovator web application interface. On the left is a navigation tree with folders like 'My Innovator', 'Change Management', 'Design', 'Documents', 'Handbooks', 'Portfolio', 'Quality', 'Sourcing', and 'Templates'. The 'Quality Handbook' folder is selected. The main area displays a document hierarchy for 'DCL00010 Rev: D'. The hierarchy includes sections like '1000 - Introduction', '2000 - Quality Assurance', '3000 - R&D Procedures', '4000 - Manufacturing Procedures', '5000 - Supply Chain Procedures', and '6000 - Marketing Procedures'. The '3000 - R&D Procedures' section is expanded, showing two documents: 'DD-10200-2345' and 'D-00001'. The 'D-00001' document is selected, and its details are shown in a table below. The table has columns: Document Number, Pos, Files, Name, Rev, Gen, Release Date, Owner, Type, and Description. The 'D-00001' document has two files attached: 'Extruder Retrofit Specifications' and 'Market Requirements Document'. Red arrows point to the 'Quality Handbook' folder, the 'D-00001' document, and the attachment icons in the table.

Document Number	Pos	Files	Name	Rev	Gen	Release Date	Owner	Type	Description
1000 - Introduction	--	--	--	A	--	--	Innovator Admin	--	
2000 - Quality Assurance	--	--	--	A	--	--	Innovator Admin	--	
3000 - R&D Procedures	--	--	--	C	--	--	Innovator Admin	--	
DD-10200-2345	10		Extruder Retrofit Specifications	A	2	8/19/2013	Demo User	Specification	xxx
D-00001	20		Market Requirements Document	A	2	3/20/2012	Innovator Admin	Specification	Market requirements spec
4000 - Manufacturing Procedures	--	--	--	A	--	--	Innovator Admin	--	
5000 - Supply Chain Procedures	--	--	--	A	--	--	Innovator Admin	--	
6000 - Marketing Procedures	--	--	--	D	--	--	Innovator Admin	--	

Click here to open
the „Document“ item
(meta data)

Click here on „attachments icon“ to open
the file attached to the „Document“ directly.
If no icon displayed, no files are attached.
If multiple files are attached to „Document“, a dialog
to pick from will be displayed.

If a „Document Section“ in hierarchy has grayed
background, then documents are attached.
(on the sub level)

Document Book Management Users

- Can access „Document Book“ versions with their attached „Document Hierarchies“
- Can create new „Books“ and „Hierarchies“ and modify the one they are the owner of.
- Can add 1 or more „top“ Sections to a Book. Each Section can hold a hierarchy of Sub Sections
- Can still access „released“ Document Hierarchies from TOC.

Document Book Management Views

My Innovator

Change Management

Design

Document Center

Document Books

ISO

Documents

Handbooks

Quality Handbook

Portfolio

Project Management

Quality

Sourcing

Templates

Document Book

Created By: Innovator Admin

Created On: 8/19/2013

Modified By: Innovator Admin

Modified On: 8/19/2013

Locked By: Innovator Admin

Major Rev: A

Release Date:

Effective Date:

Generation State:

Number	Name	Rev	Owner	Classification	Status	Description	Doc Hier	Co-Owners	Last Modified By	Last Modified	Release Date
DBK-00014	QMB TEST 200	A	Innovator Admin	Book	Preliminary	xx			Innovator Admin	8/19/2013	
DBK-00015	QMB TEST 3 Add	A	Innovator Admin	Book	Preliminary	x			Innovator Admin	8/19/2013	
DBK-00013	QMB TEST	A	Innovator Admin	Book	Preliminary	xx			Innovator Admin	8/19/2013	
DCL00010	Quality Management Handb...	D	Innovator Admin	Handbook	Released			Demo User	Innovator Admin	8/19/2013	8/19/2013

Number: DCL00010

Classification: Handbook

Document Book

Doc Hierarchy Icon

Doc Hierarchy Open Icon

Name: Quality Management Handbook

Description:

Rev: D

Status: Released

Release Date: 8/19/2013

Owner: Innovator Admin

Co-Owners: Demo User

Document Hierarchy

Top Sections

Current Version of R

Document Number	Pos	Lck	Files	Name	Revl...	Gen	State	Changes	Release Date	Owner	Type	Des
1000 - Introduction	--	--	--	--	A	--	Released	--	--	Innovator Admin	--	--
2000 - Quality Assurance	--	--	--	--	A	--	Released	--	--	Innovator Admin	--	--
3000 - R&D Procedures	--	--	--	--	C	--	Released	--	--	Innovator Admin	--	--
DD-10200-2345	10			Extruder Retrofit Specifications	A	2	Released		8/19/2013	Demo User	Specification	xxx
D-00001	20			Market Requirements Document	A	2	Released		3/20/2012	Innovator Admin	Specification	Market requirements spe
4000 - Manufacturing Procedures	--	--	--	--	A	--	Released	--	--	Innovator Admin	--	--
5000 - Supply Chain Procedures	--	--	--	--	A	--	Released	--	--	Innovator Admin	--	--
6000 - Marketing Procedures	--	--	--	--	D	--	Released	--	--	Innovator Admin	--	--

„Document Book“ Management View

„Document Hierarchy“ on tab

„effectivity“ Filter Set to „Released Versions“ to simulate „Released“ view.

Select a „Document Book“

Define „Owner“ and „Co-Owners“

Define „icons“ to be used on hierarchy view.

Top Sections of the Document Book

http://localhost/ - Document Book - DCL00010 Quality Management Handbook (read only) - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Number: DCL00010
Classification: Handbook

Name: Quality Management Handbook
Description:
Rev: D Status: Released
Release Date: 8/19/2013
Owner: [Innovator Admin](#)
Co-Owners: [Demo User](#)

Doc Hierarchy Icon Doc Hierarchy Open Icon

Document Hierarchy: **Top Sections**

Actions Create Related Hide Search Criteria Page Size:

Pos	Code	Name	Rev	Status	Owner [...]	SubSe...	Docs
10	1000	Introduction	A	Released	Innovator Admin	<input type="checkbox"/>	<input type="checkbox"/>
20	2000	Quality Assurance	A	Released	Innovator Admin	<input type="checkbox"/>	<input type="checkbox"/>
30	3000	R&D Procedures	C	Released	Innovator Admin	<input type="checkbox"/>	<input checked="" type="checkbox"/>
40	4000	Manufacturing Procedures	A	Released	Innovator Admin	<input type="checkbox"/>	<input type="checkbox"/>
50	5000	Supply Chain Procedures	A	Released	Innovator Admin	<input type="checkbox"/>	<input type="checkbox"/>
60	6000	Marketing Procedures	D	Released	Innovator Admin	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Ready Items 1-6 of 6. Page 1 of 1 **INNOVATOR**



View and manage
Top „Document Sections“
on separate tab

If „Document Book“ is locked, you can add 1 or more Top Sections here. Or remove a Top Section.
On delete of a Document Section all its sub sections will get deleted, as well. Linked Documents will
NOT get deleted

Grid Context Menu – Book not locked

http://localhost/ - Document Book - DCL00010 Quality Management Handbook (read only) - Windows Internet Explorer

File Edit Views Search Actions Release Tools Help



Document Book

Number: DCL00010
Name: Quality Management Handbook
Classification: Handbook

Rev: D Status: Released
Release Date: 8/19/2013
Owner: Innovator Admin
Co-Owners: Demo User

Doc Hierarchy Icon Doc Hierarchy Open Icon

Document Hierarchy Top Sections
Current Version of R: [v]

Document Number	Pos	Lck	Files	Name	Revi...	Gen	State	Changes	Release Date	Owner	Type	Description
1000 - Introduction	--	--	--	--	A	--	Released	--	--	Innovator Admin	--	--
2000 - Quality Assurance	--	--	--	--	A	--	Released	--	--	Innovator Admin	--	--
3000 - R&D Procedures	--	--	--	--	C	--	Released	--	--	Innovator Admin	--	--
DD-10200-2345	10	--		Extruder Retrofit Specifications	A	2	Released	<input type="checkbox"/>	8/19/2013	Demo User	Specification	xxx
D-00001	20	--		Market Requirements Document	A	2	Released	<input type="checkbox"/>	3/20/2012	Innovator Admin	Specification	Market requirements spec
4000 - Manufacturing Procedures	--	--	--	--	--	--	--	--	--	--	--	--
5000 - Supply Chain Procedures	--	--	--	--	--	--	--	--	--	--	--	--
6000 - Marketing Procedures	--	--	--	--	--	--	--	--	--	--	--	--

View Item
View Document Files
Refresh this Section
Release Sections (down)
Revise Sections (up)
Update To latest Released Document


Open row's item (Section or Document)

Reloads selected Section and Sub Sections. Useful on large hierarchies

Grid Context Menu – Book is locked

http://localhost/ - Document Book - DCL00010 Quality Management Handbook - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help



Document Book

Number: DCL00010
Name: Quality Management Handbook
Classification: Handbook
Description:
Doc Hierarchy Icon: [Select an image...](#)
Doc Hierarchy Open Icon: [Select an image...](#)
Rev: D Status: Released
Release Date: 8/19/2013
Owner: Innovator Admin
Co-Owners: Demo User

Document Hierarchy Top Sections

Document Number	Pos	Lok	Files	Name	Revi...	Gen	State	Changes	Release Date	Owner	Type	Description
1000 - Introduction	--	--	--		A	--	Released		--	Innovator Admin	--	
2000 - Quality Assurance	--	--	--		A	--	Released		--	Innovator Admin	--	
3000 - R&D Procedures	--	--	--		C	--	Released		--	Innovator Admin	--	
DD-10200-2345	10			Extruder Retrofit Specifications	A	2	Released	<input type="checkbox"/>	8/19/2013	Demo User	Specification	xxx
D-00001	20			Market Requirements Document	A	2	Released	<input type="checkbox"/>	3/20/2012	Innovator Admin	Specification	Market requirements spec
4000 - Manufacturing Procedures	--	--	--		A	--	Released		--	Innovator Admin	--	
5000 - Supply Chain Procedures	--	--	--				Released		--	Innovator Admin	--	
6000 - Marketing Procedures	--	--	--				Released		--	Innovator Admin	--	

Context Menu:

- View Item
- View Document Files
- Refresh this Section
- Release Sections (down)
- Lock
- Unlock
- Add existing Document to Section
- Add Sub Section...
- Update To latest Released Document

Lock/ Unlock selected row's item →

→ *Select existing document and add to selected Section row. Section must be locked,*

→ *Add a new sub section to selected Section row. Section must be locked,*

Open Document Section from Grid

http://localhost/ - Document Book - DCL00010 Quality Management Handbook (read only) - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Number: DCL00010
Name: Quality Management Handbook
Rev: 0
Status: Released
Release Date: 8/19/2013
Owner: Innovator Admin

Document Book

Doc Hierarchy Icon Doc Hierarchy

Document Hierarchy Top Sections

Current Version of R

Document Number	Pos	Lck
1000 - Introduction	--	--
2000 - Quality Assurance	--	--
3000 - R&D Procedures	--	--
DD-10200-2345	10	--
D-00001	20	--
4000 - Manufacturing Procedures	--	--
5000 - Supply Chain Procedures	--	--
6000 - Marketing Procedures	--	--

http://localhost/ - Document Section - Quality Management Handbook 4000 (read only) - Windows Internet Explorer

File Edit Views Search Actions Reports Tools Help

Code: 4000
Name: Manufacturing Procedures
Rev: A
Status: Released
Release Date: 5/8/2012 10:03:18 AM
Has Documents: ☐
Co-Owners: Demo User
Owner: Innovator Admin

Document Section

Hierarchy Navigator Documents Sub Nodes

Current Version of R

Document Number	Pos	Lck	Files	Name	Rev...	Gen	State	Change
4000 - Manufacturing Procedures	--	--			A	--	Released	

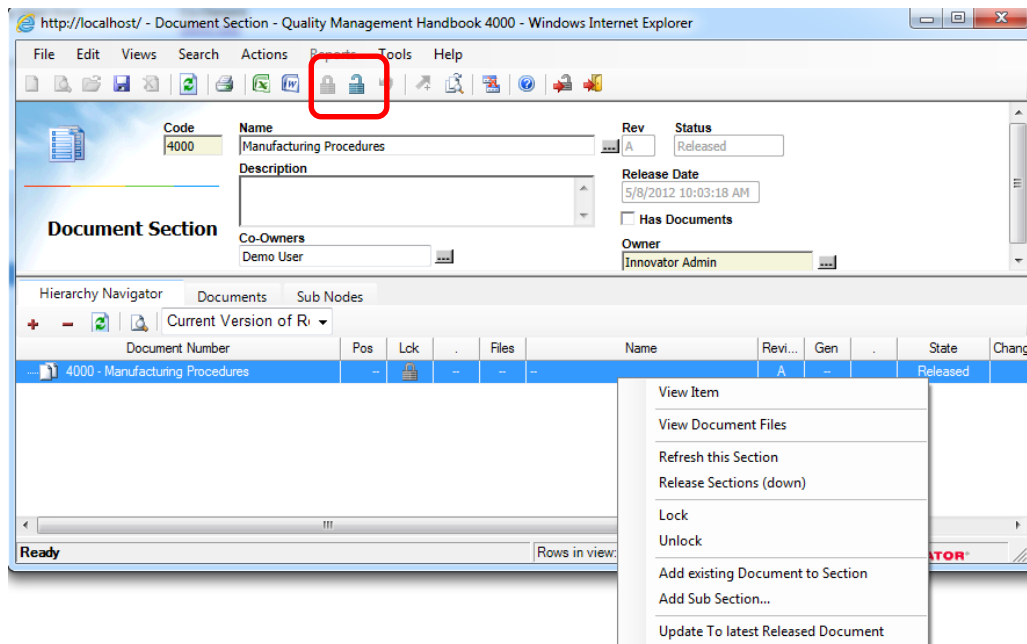
View Item
View Document Files
Refresh this Section
Release Sections (down)
Revise Sections (up)
Update To latest Released Document

Ready Rows in view: 1

Use „View Item“ action or icon to open Section in separate form

If top Section is not locked. this context menu will show

Context Menu – Top Document Section is locked



If a user is not an owner of the top level „Book“ but the owner of a „Section“ in the hierarchy, this Section can be locked and opened in a separate form to get access to this context menu. This will allow adding sub sections and documents quickly.

Use Cases

Create new Document Book and Hierarchy

As Member of „Document Book Management“

- Add new Document Book
- Add new Top Sections (nodes of Document Hierarchies) to Document Book
- Add new Sub Sections (nodes) to Document Hierarchy
- On various levels of the Hierarchy add links to existing or new Documents
- Use different Owners for Document Sections (on Hierarchy)

Initial Release of Document Book and full Hierarchies of all top nodes

- Create new Document Book and Hierarchy (other use case)
- On preliminary Document Book use Action „Release Book (full Structure)“

Revise Document Book (only)

On released Document Book run action „Revise Book (only)“

- On „preliminary“ Document Book use Action „Release Book (only) – (after changes were made)“

Revise Document Sections (Hierarchy Nodes) including Document Book

- On released Document Section run action „Revise Sections (up)“.
- You must be owner of the Document Section and owner of or member of co-owners of the Document Book (of the top node of this hierarchy)

Use Cases (2)

Linking one Document Book to TOC (Handbooks)

- Administrator Users: go to TOC → Variables
- Edit variable „ TOCDBK_TOC Quality Handbook“ and then enter the item number of the Document Book you want to link to. (i.e. DCL00001)
- You can add an exact major_rev of the Book (i.e. DCL00001,B)

Release of partial Hierarchy (down)

- On Document Hierarchy of Document Book go to a Section inside hierarchy. Use context action „Release Sections (down)“
- You must be owner of this hierarchy node
- Refresh tree grid → all Nodes down are released

On Hierarchy Grid: Update To Latest Released Document

- If a Document Section is released but linked documents are not released, this relationship is „fixed“. Meaning, if the document gets revised and released, the Document Section on the hierarchy will still show its previous generation. A icon (red arrow up) will indicate this situation on the grid.
- This action can now help to update the ,“released“ Document Section (relationship) to pull in the latest released generation of this document.
- On a document row run action „Update To Latest Released Document“.
- The parent Document Section must be in state „Released“ and you must be the owner of this Document Section.